DOCUMENT RESUME

ED 291 920 CE 049 763

AUTHOR Onuska, Sheila
TITLE Company-School Collaboration: A Manual for Developing Successful Projects.
INSTITUTION American Council of Life Insurance, Washington, D.C.
PUB DATE [87]
NOTE 62p.; Photographs may not reproduce clearly.
PUB TYPE Guides - Non-Classroom Use (055)

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Career Education; Classroom Techniques; *Cooperative Programs; *Corporate Support; Educational Planning; Education Work Relationship; Elementary Secondary Education; *Program Development; *Program Implementation; *School Business Relationship; School Involvement; *Student Organizations

ABSTRACT

This manual, developed by members of the staff of the St. Louis, Missouri, Public Schools, is intended to help company officials responsible for planning, implementing, and coordinating company-school collaborative programs to perform these tasks and guide the co-workers who assist them. The manual is organized in five chapters. Chapter I presents the case for cooperation and establishes principles for action. Chapter II describes the options available, such as community partnerships, special assistance, individualized programs, adopt-a-school, and limited collaboration. Chapter III defines the roles of the company and school participants. Chapter IV contains strategies and techniques for designing and operating projects. Topics covered include staff development classroom activities, special services, career education and other curriculum areas, and national programs such as Junior Achievement and Future Business Leaders of America. Chapter V gives advice about evaluating and promoting the programs. (KC)

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Company-School Collaboration

A MANUAL FOR DEVELOPING SUCCESSFUL PROJECTS

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

Education Services - American Council of Life Insurance

Project Director: Eve Katz
American Council of Life Insurance

This manual was developed by members of the staff of the St. Louis Public Schools under the direction of Wayne Walker. The principal writer was Sheila Onuska. Marjorie Gordon, Chris Jenkins, and Nellie Harrison provided expert secretarial assistance. The following staff members helped with the project: Patricia Burnett, Linda Riekes, Calla Smorodin. The project also benefited from the advice of Susan Katzman and Peter Rein.

Welcome support and advice were given by these Council member company representatives: Michael E. Bishop, Provident Life and Accident Insurance Company; T. Oscar Burris, Jr., Lamar Life Insurance Company; Robert O. Carboni, Northwestern Mutual Life Insurance Company; Richard A. Edwards, Metropolitan Life Insurance Company; Mark J. Ewing, Baltimore Life Insurance Company; Stephen D. Gavin, Pacific Mutual Life Insurance Company; Lawrence G. Martin, Bankers Life and Casualty Company; Robert F. Phillips, Aetna Life Insurance Company; Mac Roy Rasor, Southwestern Life Insurance Company; Franklin L. Stafford, John Hancock Mutual Life Insurance Company; Walter J. Walsh, Bankers Life Company; Donald J. Zimmerman, Ohio National Life Insurance Company; as well as William H. Rabel of the Life Office Management Association; and council staff members Regina Dolan, Iris M. Elfenbein, K. Edwin Graham, Stanley G. Karson, and William E. Kingsley.

TO THE USER OF THIS MANUAL

As the user of this manual, you are assumed to be the company official responsible for planning, implementing, and coordinating company-school collaborative programs. The manual and accompanying materials will help you perform these tasks and guide the co-workers who will assist you.

Company-school cooperation will benefit your company, your community, and your schools. Your chief executive officer has demonstrated awareness of this by designating you to design activities to meet the needs of your company and your schools.

Before you begin to develop a program, read through this manual. **Chapter I** presents the case for cooperation and establishes principles for action. **Chapter II** describes the options available. **Chapter III** defines the roles of the company and school participants. **Chapter IV** contains strategies and techniques for designing and operating projects. *This* is the section of the manual that provides especially useful practical advice on working directly with administrators, teachers, and students. **Chapter V** gives advice about evaluating and promoting your programs. When you have finished reading, you will have the information you need to begin work.

Sections of the manual will be useful to other company personnel. The CEO may want to read about the options for collaboration in Chapter II. Volunteers will benefit from the advice on working in the classroom in Chapter IV and the company public relations department can get ideas from Chapter V.

Your challenge is to design programs that make the best use of your company's resources. This manual can help.

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I. ESTABLISHING COMPANY-SCHOOL LINKS

Your company can become part of a growing nationwide movement toward increased business-education collaboration by starting or building upon existing company-school activities. The insurance industry, as represented by the American Council of Life Insurance (ACLI), is promoting a new initiative in company-school cooperation, concentrating on grades 7 to 12.

Your company is in a position to make a significant difference in your local schools. It has been demonstrated that the most effective unit of educational improvement is the individual school. This manual can help you put your resources where they are most needed and structure your activities to have the most impact in the schools and in the community.

ACLI members and schools were surveyed to learn about successful collaborations. Business and school personnel told us what programs they currently participate in, what kinds of activities are going on, and what activities they would like to undertake.

Your support for the industry-wide initiative is needed. Your commitment and your talents can sustain this effort. Your company, your schools, and you will benefit.

BENEFITS

There are practical reasons for encouraging company-school collaboration. As a leader in your company's developing collaboration you may find people who need to be reminded of them. The following reasons make a convincing rationale:

To the Company and Its Employees

- Corporate taxes are used more effectively to support better schools.
- Business products, services, and policies are better understood.
- Job training needs decline.
- The image of the company and business is enhanced.
- Educators and students make more informed public policy decisions affecting business.
- Equal employment opportunities increase.
- Employee morale improves as they and their company become involved.
- Current employees' volunteer efforts become better organized and more visible.

To the **Community**

- Community stability is strengthened.
- Support for the school system increases.
- Schools are better able to respond to business and community needs.
- Local taxes are efficiently used.
- Community stability is enhanced.
- Cooperation among community leaders is developed.

To the **Schools and Their Students**

- Educators become aware of the business point of view on many issues.
- Teacher morale improves.
- Business and management techniques make school operations more efficient.
- Students and teachers are better informed consumers.
- Students and teachers are challenged by new ideas.
- Students will understand how basic skills are used in business.
- Students learn about careers in business.
- Job opportunities for graduates may develop.

BACKGROUND

The insurance industry has always been an innovator in business-education cooperation. The work begun forty years ago by the Institute of Life Insurance is carried on by the American Council of Life Insurance and the Health Insurance Association of America. The Education Division of the ACLI supports conferences, materials development, teacher education projects, a business-executive-in-residence program, and many other efforts to strengthen the industry's role in education. The Education Division is available to help you.

Company-school collaborative activities are in keeping with the tradition of leadership in community involvement that the business has established through its Center for Corporate Public Involvement, specifically its efforts to address the problem of the hard-to-employ.

THIS MANUAL

The Education Division has prepared this manual to help your company initiate or expand collaborative programs with the schools. The programs described here and the techniques suggested come from people who are actually doing what you are planning. Company personnel and school people have given you the benefit of their experience.

Using the information here, the additional resources in the accompanying materials, and help from the Education Division, you can design activities to be proud of.

PRINCIPLES

Successful collaboration must be built on a foundation of mutual respect and commitment to principles. Participants from both the companies and the schools must respect each other as professionals. Both groups must agree on a common set of principles before they begin to develop or initiate programs.

The following principles can guide a successful collaboration:

1. Commitment from company leadership is essential. The chief executive officer's support is absolutely necessary. The more directly he or she is involved, the greater the chances for success.
2. On the school side, support from the individual school's principal is equally important. Of course, school board approval should be sought, but without the involvement of the principal, programs in schools simply do not work.
3. Both parties must accept the premise that the ultimate goal of the collaboration is to improve the education of all students. Nothing must interfere with that objective, even though individual projects may have more limited target audiences.
4. Programs need not follow established patterns as long as they meet mutually agreed upon goals.
5. Planning should include representatives from the company and the school. Schools should include companies in their long-term planning and companies should conceive of their efforts as part of that long-term plan.
6. Both parties should agree that the collaborative effort be given time to develop. A year is the usual length of an initial agreement.
7. Honesty and flexibility should characterize each interchange between the partners. Schools should be realistic about what business can provide and open to new approaches. Companies should be straightforward about the extent of the resources they will commit and sensitive to the realities of the schools today.

Just as these principles should guide your collaboration, the following snares should be avoided:

1. Realize that schools do not and cannot operate like businesses.
2. Look at your participation as something more than a means of recruiting potential employees.
3. Stay away from publicity gimmicks.

4. Promise only what you can deliver and be realistic about the results you can expect.
5. Plan to make a contribution that is something more than financial.
6. Build up to success.
7. Stick with your program when it runs into the inevitable rough spots.

Cooperative efforts based on these mutually-held principles and on avoiding these pitfalls are successful. Before you can design a program, you need to examine what the options available to your company involve.

II. DETERMINING YOUR COMPANY'S ROLE

The decision on *what* to do depends on how much your company wishes to do. Your company's desired and actual level of commitment will determine both the scope of your activities and the success of your endeavors. There are many options from which you can choose.

OPTIONS

Adopt-a-school, partnership, involvement in career education activities, executive-level participation in community affairs, minority recruitment efforts—the list of existing local examples is almost limitless. You may recognize some local or national approach. Program titles often overlap, however, or imply similarities that are not there. What these programs have in common is their track record. They work.

Information gathered from the survey forms, from schools and school districts, and from individuals in the field defines three styles of collaboration: (1) participation by company leadership in community-wide partnerships; (2) company participation at senior levels in special projects with limited short-term goals; and (3) joint company-school development of individualized programs. Many company-school collaborations include aspects of all three styles.

After reading the descriptions of all the possibilities and bearing in mind what you know of your company, your community, and your co-workers, you can design programs of cooperation that will make the best match of resources and needs.

Community Partnerships

More and more Americans recognize that solving national problems requires local effort. Community partnerships working through collaborative councils have provided local solutions based on local resources. Collaborative councils are basically nothing more than some kind of "neutral turf" where representatives of the community (business, labor, cultural organizations, education, concerned citizens) can decide how to meet community needs using community resources.

Collaborative councils share certain characteristics. As one wag put it, they have "very significant leadership and very modest financial resources." Characteristics also include participation by individuals who represent institutional commitments, a diversity of working styles reflecting local needs, and concern for the future of young people as it relates to their schooling and their future work.

The leading role may be taken by the Chamber of Commerce, the Private Industry Council, an individual, a corporation, or a community service organization such as the Junior League. Collaborative council programs reflect local needs.

For more information on community partnerships:

Partnership Dataline, USA (continuing the work of the President's Task Force on Private Sector Initiatives), an information system and a database of 6,000 examples of partnerships and other local initiatives for community problem-solving. Call 800/223-6004. (In New York state, Alaska, and Hawaii, call 212/730-7930.)

The Allegheny Conference on Community Development of Pittsburgh, for example, concentrates on community development as well as education issues. Top corporate leadership supports downtown development, health care planning, community development, and human development. Education-related activities include awarding mini-grants to teachers, sponsorship of school-business partnerships, and coordinating a comprehensive arts-in-education program that includes all the school district's arts-related activities.

Many councils, such as the Memphis School and Business Partnership, concentrate on business-education relationships. Since 1974, Boston's Tri-Lateral Council for Quality Education has been an example of a sophisticated and successful collaborative council in a large metropolitan area. Whatever their names, councils perform similar tasks: they provide new services, they broker existing services, and they operate special projects.

Exemplary Community Education Partnerships

Boston's Tri-Lateral Council for Quality Education
The most recent initiative of the city government and the business community is the Boston Compact—a pledge of demonstrable gains in the number of high school graduates, in math and reading skills, and in percentages of graduates working or continuing their education.

Nashville's Project PENCIL
Committed to a strong public school system, representatives from business, education, and civic organizations formed PENCIL (Public Education Nashville Citizens Involved in Leadership) to coordinate their efforts. Their major objective is to establish an adopt-a-school program in all 128 public schools.

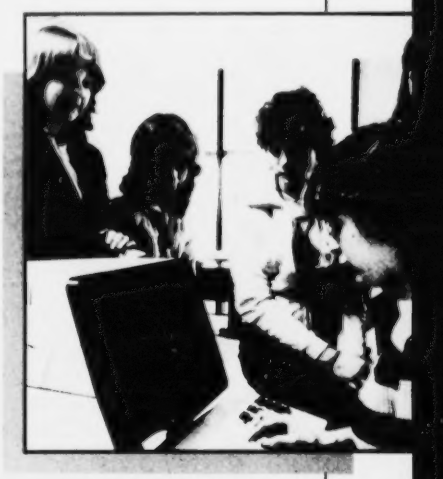
Hartford's School/Business Collaborative
Activities have a goal of improving basic education in the schools, kindergarten through grade 12, with specific emphasis on increasing youth employability. The Collaborative is affiliated with the Chamber of Commerce and functions as a clearinghouse and facilitator.

continued

Seattle's PIPE

PIPE (Private Initiatives in Public Education) describes itself as a conduit for community resources and involvement in the schools. One-on-one school-company partnerships are developed, and companies are also encouraged to serve as partners-at-large offering resources to larger numbers of schools.

You can find out more about councils in your area from two national networks which coordinate information about business-industry-education cooperation: the National Association for Industry-Education Cooperation, a network of over 60 local councils, and the National Institute for Work and Learning, a consortium of programs focused on education and employment.



National Networks

The National Association for Industry-Education Cooperation (NAIEC) is a network of over 60 local industry-education councils headquartered in Buffalo, New York. NAIEC members share the goals of using the volunteer resources of industry to improve education at all levels.

Activities sponsored by NAIEC are aimed at making school and business personnel more aware of each other's complementary needs and assets. Programs focus on staff development activities for school personnel to make them more familiar with business employment needs and community resources for collaborative programs.

National Association for Industry-Education Cooperation
235 Hendricks Boulevard
Buffalo, NY 14226
716/833-6346

The National Institute for Work and Learning (NIWL), formerly the National Manpower Institute, coordinates the federally funded Work-Education Consortium through which community representatives can work to improve the relationship between schooling and employment. In addition, NIWL provides technical assistance (advice, publications, conferences, workshops) to consortium members.

National Institute for Work and Learning
Suite 301
1211 Connecticut Avenue, N.W.
Washington, DC 20036
202/887-6800

There are also statewide agencies coordinating business-education relationships. In North Carolina, individual efforts resulted in a statewide approach to involving business in the classroom. The Governor, in cooperation with the State Superintendent of Public Instruction, designated a concerned individual to develop strategies and programs for the state. Colorado's statewide initiative is focused on the related concepts of career education and economic education and is spurred by the participation of the state and local chambers of commerce.

State Networks

In *North Carolina* an alliance between the Governor and the State Superintendent of Public Instruction resulted in a statewide effort to establish good communications between public education and the business community. Their cooperation was intended to circumvent two factors that commonly inhibit formation of school-business joint ventures: the schools do not know precisely what they want from business and business is not sure what to give them. North Carolina's solution was to appoint an education-business liaison (the first one was an executive on loan from a major corporation) whose responsibility was to travel throughout the state encouraging individual schools and businesses to work together. Programs were designed to use business and education resources effectively in long-range projects rather than in one-shot temporary connections which were felt to waste the time and energy of both parties. For example, industry scientists began to work with advanced science classes and industry employees set up a school-based program for gifted and talented students. For more information:

Division of Community Schools
Department of Public Instruction
114 West Edenton
Raleigh, NC 27611
919/733-6086

Concern for career education and economic education fuel the *Colorado* program. The major agencies behind the comprehensive career education program are the state education department, the universities and the Colorado Association of Commerce and Industry (CACI) representing the local chambers of commerce. Under the auspices of the CACI, local business-education councils support career education activities: community resource centers, shadowing programs, career fairs, work-study programs, and staff development for teachers, counselors, and administrators. The economic education side of the program is promoted by the Colorado Council on Economic Education (CCEE), an independent non-profit organization funded by business and industry. CCEE focuses on teacher education as the primary means of spreading its message of economic education. Activities include workshops, college-credit courses, seminars, and programs of speakers. Through the efforts of the two state-local coordinating groups, most of the state's schools are in direct contact with business representatives. For more information:

Colorado Council on Economic Education
University of Colorado
Business 154, Campus Box 416
Boulder, CO 80309
303/492-6465

Even this brief description of community partnerships and how they work indicates their strengths and weaknesses. Their primary strength, of course, is the collective caliber and clout of the individuals who serve on them and of the institutions they represent. Participation in the work of the councils is for blue-ribbon panel members, and results are blue-ribbon results. This approach is effective for energizing the totality of community

resources and implementing strategies that disregard traditional boundaries between business, education, and labor. Council membership is drawn from the highest level of the participating institutions and council activities benefit from this access to the local power structure.

Many of the sophisticated, multi-level cooperative programs currently benefiting schools and businesses began in such councils. Dallas and Baltimore are two examples. The Dallas effort grew out of the Community Network for Public Education founded in 1976 to help achieve peaceful implementation of desegregation. Along the way, the Chamber of Commerce became heavily involved in the career education aspects of school programs. In Baltimore, a comprehensive adopt-a-school program developed from the city's successful efforts to regenerate its downtown area. The schools and the Inner Harbor have both benefited.

Collaborative Councils

Guidelines for Effective Participation

- Principles for effective participation in collaborative councils are based on common business sense.
- Be aware of the local context—its opportunities and restraints.
- Articulate the company's objectives in participating and the resources it is willing to commit.
- Work with co-participants to identify specific problems and areas of mutual interest.
- Select the problem area to be addressed and develop a range of approaches for doing so.
- Design a specific plan of action with clearly defined tasks for each participating agency or individual.
- Implement and evaluate the plan.
- Capitalize on the momentum and use the results of the evaluation to begin on the next problem area.

Guidelines for Choosing Successful Projects

- Focus on issues of mutual community-business concerns.
- Involve the highest level participants: chief executive officers, school superintendents, government leaders.
- Start small, then build on success.
- Choose well-defined, short-term activities.
- Plan the implementation stage with care.

Guidelines for Implementation

- Designate someone capable, professionally respected, and interested in the project to take charge.
- Develop a monitoring system.
- Pay attention to publicity and internal communications.

continued

- Seek advice from local and national experts.
- Give credit where credit is due before, during, and after the project.
- Evaluate successes and failures.
- Use momentum to start up the next project.

(Adapted from *Developing Public-Private Approaches to Community Problem-Solving* published by SRI International.)

For more information:

SRI International
333 Ravenswood
Menlo Park, CA 94025
415/326-6200

While the corporate leader may expect to serve in such capacities, it may also be desirable for the company to have a more intimate and identifiable relationship with the schools. If so, the company's involvement may be expanded to include some of the other options available.

Strategies for Successful Community Partnerships

How to Make Your Company's Participation Count

- Set up regular and frequent meetings.
- Encourage members to do their homework.
- Assign high-caliber professionals.
- Actively seek input from all segments of the local and national scenes.
- Work to adapt individual goals and priorities to community needs.
- Build additional coalitions based on partnership work.
- Provide training for new community leaders.
- Recruit new members from the community.

Special Assistance

There is a category of business-education relationships that falls somewhere between membership in a collaborative council and the myriad individualized activities undertaken by individuals, companies, and schools. Here can be included service on local and state school boards, membership in corporate advisory groups serving the several levels of education, and participation in special task forces addressing a particular crisis or serving a one-time need.

These activities are so common and of such long-standing existence that people often fail to consider them links between business and education, and downplay their importance as compared with the newer, perhaps more glamorous forms of partnership. Representatives of business have

long served on local school boards; two-thirds of the board members across the country are in professional or managerial occupations. Hundreds of business representatives advise career and vocational education programs. Many individuals also serve as school volunteers through membership in parents' groups, scouting organizations, or PTAs.

Such activities by employees can be the beginning of a more structured and more integrated company involvement. Your colleagues' efforts and their experience should be included in any company-wide appraisal of collaboration.

Special Assistance to Schools

Minneapolis, Minnesota

"New Careers for Educators" is a business-sponsored program helping educators learn about alternate careers. Program sponsors provide career-change information and counseling. For more information:

Greater Minneapolis Chamber of Commerce
15 South Fifth Street
Minneapolis, MN 55402
612/370-9132

Akron, Ohio

"Youth Motivation Task Force" brings educators together with members of the National Alliance of Business and the Private Industry Council to develop and implement ways of improving young people's motivation and attitude to work. For more information:

National Alliance of Business Clearinghouse
1015 15th Street, N.W.
Washington, DC 20005
202/457-0040

Houston, Texas

Community representatives from the private sector are proposing a pilot program to combat the "latch-key syndrome," in which employee morale and effectiveness are affected during the after-school hours because of parental concern for unattended or "latch-key" children who are alone at home. The program will provide enrichment activities and care for these otherwise unsupervised children at the end of the school day. For more information:

Coordinator
VIPS Business/School Partnerships
3830 Richmond Avenue
Houston, TX 77027
713/626-2950

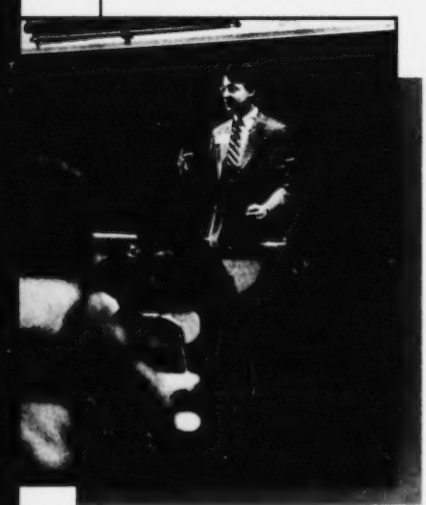
continued

Florida

The State Department of Education in conjunction with its Business/Education Partners offers discounts and benefits to recognized school volunteers. Ten hours as a school volunteer or three hours as a community resource entitle volunteers to participate. The program encourages volunteers to support the schools and provides a means of rewarding them while it identifies participating businesses as good community citizens. For more information:

Coordinator
School Volunteer Program
Division of Public Schools
Florida Department of Education
Tallahassee, FL 32301
904/488-8385

Individualized Programs



Individualized programs answer the needs of companies that want more than senior-level membership in a collaborative council. They answer specific school needs and give companies a more identifiable presence in the schools. They can follow existing models or break new ground. They can mean participation in an established national program. You can choose from all these options.

Besides serving the specific needs of schools, *individualized programs bring great benefits to companies and their employees.* The thrust of most of the programs and projects now in operation is toward development of such special company-school relationships. *In the long run, they bring the most benefits to all who participate.*

Options for Company-School Collaboration

Activity	Company Resources	Company Participants
Community Partnerships Blue-ribbon panels of community representatives	Limited	Senior level only
Special Assistance Limited-goal, short-term projects School board and special task force membership	Limited	All levels
Individualized Programs Individual schools and companies working together (sometimes known as Adopt-a-School or Partnership)	Limited to extensive	All levels

Before trying to determine your company's level of commitment to company-school activities, it is helpful to know about the various styles of collaboration.

WORKING STYLES

While there is no national organization that licenses or franchises company-school collaborations, there are a number of programs operating under titles that suggest a "name brand" identity. You may be familiar with the terms "adopt-a-school" and "partnership." These generic names are loosely applied to styles of working with schools rather than to specific programs. In reality, the two labels are often used interchangeably and many programs with the one title could just as well have the other.

To make the issue more confusing, some educators feel the term "adopt-a-school" is paternalistic, connoting an outmoded style of business-education relationship. They prefer "partnership." Some companies may feel that adopt-a-school implies too large a commitment. (This is not true; your commitment can be modest.) Other locales refer to adoption until the process is formalized and becomes a partnership. On occasion, the school-initiated programs are referred to as adoptions and the business-generated ones are known by the more neutral term "partnership."

Those most familiar with the issue agree, however, that there are two recognizably different styles of company-school collaboration. They can be differentiated as comprehensive, on the one hand, and limited, on the other. In the sense it is used here, adopt-a-school refers to a comprehensive and rather formal agreement covering many services and programs undertaken by a company in its entirety and a specific school in its entirety.

Limited relationships between companies and schools may not involve the whole company or the whole school. They can include only a few employees or only one teacher. Company personnel, time, and resources are committed in a limited way. While some partnerships fit this description, not all do; therefore, this style of working with schools is not equated with partnerships, but rather is referred to simply as a limited collaboration.

Adopt-a-School

The purpose of most adopt-a-school progams is to establish a one-on-one relationship between a company and a school in which the company will assist the school for at least one year. In its purest form, a school will have only one adopter, but in most cases the school will accept more than one and a company may choose to adopt more than one school. Often the relationship is formalized in an adoptive agreement or contract and celebrated with a ceremony and a certificate.

In most adopt-a-school programs, a professional coordinator has the responsibility of pairing an interested company with the appropriate school. Depending on the local situation, this person may be an employee of the schools, the Chamber of Commerce, a collaborative council, or some non-profit agency incorporated specifically to set up and monitor such pairings.

The pairing may be based on such factors as school location or grade level, but the compatibility of needs and resources should be paramount. Surveys of school needs and company resources will help representatives from each establish priorities and develop a clearly defined plan of action that is realistic and that effectively matches resources with needs. The logistical details required for implementation should be undertaken jointly by the company and school coordinators.

The plan may focus on a single area, such as staff development, or it may include administrative and classroom activities as well as special projects. Some companies prefer to provide only support services or material support and not to participate in the school's instructional programs.

Since business volunteers provide these services, the school does not pay the business for a specific program. The participants, however, should give serious consideration to any sources that will provide long-term funding for the program, because one goal of an adopt-a-school program is to establish a relationship that will last beyond the first year. The funding needed to pay for the administrative costs and transportation of students to business sites may come from a variety of sources: foundations, corporations, school districts, and federal or state funds. In some programs an attempt is made to estimate the value of the company's in-kind services; in others, participants believe that no attempt should be made to place a dollar value on these volunteer services.

Among the advantages of adopt-a-school are:

- It establishes priorities and a plan of action.
- The responsibilities of the participants are clearly delineated from the beginning.
- It makes efficient use of the company's resources by coordinating and integrating them into a plan.
- It promotes professionalism among the participants.

Among the disadvantages of a formal and structured approach to company-school collaboration are:

- The company may not want to commit its resources for an extended period of time.
- Potential company participants may find the adoptive agreement too binding.
- The company may have more difficulty in justifying this type of involvement to its stockholders.
- If the program is not a success, the failure will be magnified because of the nature of the formal relationship.
- Staff in the school and in the company may feel compelled to participate because their supervisors have made the decisions.

Limited Collaboration

The alternative to adopt-a-school is a limited collaborative pairing of a company with a school. The pairing may be established between a small number of business volunteers or a department or division of a company and a single teacher or department in a school.

A company coordinator who has easy access to school personnel is essential. He or she can be an employee of the company, the Chamber of Commerce, a school agency or another coordinating agency. The coordinator interviews an interested teacher, supervisor, or department head and together they draft a proposal explaining how volunteers from a company can assist the school's instructional goals. The coordinator then locates a partner for the teacher and presents the teacher's plan of action to the appropriate company representative. If the company decides to participate, the teacher and company volunteers decide on the final format of the program.

Limited partnerships can be microcosms of the more comprehensive adopt-a-school programs. They can also provide staff development and administrative support services, and their potential funding sources are the same. If a company is working with the schools for the first time, a limited approach may be a good way to begin. Among the advantages of a limited collaboration are: the small company may be reluctant to adopt a whole school; a company's involvement with a school can expand naturally and gradually; if a teacher is transferred, the company can easily move its program to the teacher's new school; a larger number of companies can work with a single school; the teacher has a stake in the program because he or she helped to design it; the program can operate without much administrative support. Among the disadvantages to limited collaborations are the fact that it is difficult for the company to understand the school's long-term goals and needs and that the company's resources may not be used efficiently to meet the school's needs.

The best programs—the exemplars for company-school collaborations—whether they are coordinated on a city-wide basis, as in Chicago, Memphis, St. Louis or Indianapolis, or are built on individual company-school initiatives—illustrate the advantages of both approaches. Good planning, open lines of communication, and flexibility will give you a successful program no matter what you name it.

Collaborations from the School Point of View

The National Education Association has developed guidelines for teachers' involvement in adopt-a-school programs. The insight into what schools and teachers expect will be helpful as you design your projects. For information contact:

Dr. Sharon Robinson
Director, Instruction and Professional Development
National Education Association
1201 16th Street, N.W.
Washington, DC 20036
202/822-7350

LEVEL OF COMMITMENT

Time after time—in the surveys, in telephone interviews, in the published reports—respondents have emphasized the importance of commitment from the highest levels of the company. The support of the chief executive officer and the designated officer in charge is the single most important factor in the success of the enterprise.

Some decisions about level of commitment should be made before you decide which approach or approaches you can consider exploring further. Answers to the following questions will help you determine your company's desired level of commitment:

The Local Background

- What is the status of business-education programs in the community?
- Is your company participating in any of them? If not, why not? If yes, is the participation satisfactory? If not, why not? If yes, what are the benefits?

The Company Scene

- Is there support from the chief executive officer?
- Is someone personnally responsible for developing a plan for company-school collaboration?
- How are company personnel currently involved in the schools? Do individuals serve as school board members or career education advisors or volunteers? What does their experience tell you?
- Are there preferred options within the company? Work with community partnerships, establishment of a community partnership, special projects like youth employability, individualized programs?
- Will this be part of a continuing effort?

The Details

- Will employees work directly with teachers and students in the classroom?
- Will activites take place after school?
- Will the company provide administrative assistance to the school?
- Will employees be allowed released time?
- Will activities take place at company locations?
- How many departments will be involved? How will this be determined?
- What company resources can the program use? Publications, financial support, facilities, transportation, meeting rooms, supplies?

The answers to these questions *plus* the wholehearted support of the chief executive officer will help you begin.

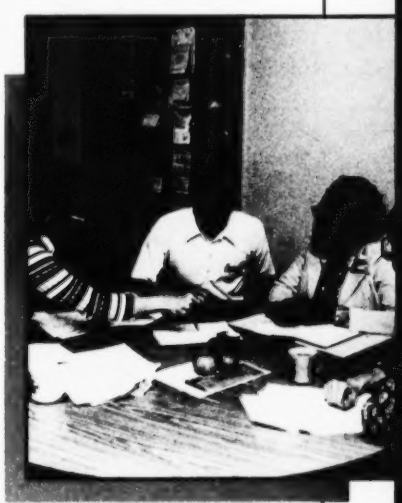
III. COMPANY AND SCHOOL WORKING TOGETHER

The vast majority of schools and school districts are interested in developing or expanding school-business collaboration. By beginning slowly and by carefully seeking school input into all major decisions, a company can be assured that most schools will be receptive.

Once the company has determined that it wishes to participate in a collaborative effort, the next step is a formal approach to the highest levels of the school system—the local Superintendent of Schools or the president of the school board or both.

Since school boards are responsible for setting school policies and goals, they need to be informed about proposed collaborations. Board support will strengthen your relationship with the schools, and board members' links to the community will help promote your programs. The local superintendent's support is also necessary, although he or she may not be directly involved in your program in a school. In many areas, an assistant superintendent for curriculum and instruction will be the district-level administrator you will work with.

The school building principal is likely to be the administrator with whom you will work most closely as your program develops. But do not overlook the necessity of soliciting and maintaining support from the upper levels of the school administration. This support is as critical to your success as that of your CEO.



WORKING WITH ADMINISTRATORS

The initial contact between the company and the school system fulfills two purposes: (1) it brings together the major participants and those on their staffs who will develop and coordinate the program, and (2) it lays the foundation for the development of the program. Personnel at this meeting may or may not actually include the CEO, the superintendent, and the school board president; their representatives can act for them.

If collaboration is not to be limited to a specific project but will involve many kinds of support, then the company should survey its available resources. The school should conduct a needs assessment. These exercises will focus future discussions and give them a basis in reality without raising false expectations.

Company Resource Survey

Activity	Current Involvement	Potential Involvement
Volunteer activities with students		
Classroom activities in curriculum areas (specify areas of interest)		
• Tutoring		
• Library, clinic, playground, athletics		
• Transportation		
• Career Education		
• Service on advisory groups		
Teaching mini-courses		
• Subject area		
• Target audience		
Field trips		
• Company sites		
• Others		
Special projects		
• Awards		
• Athletic teams		
• School publications		
• Art and music		
• Sponsorship of student groups		
Financial support		
• Scholarships		
• Mini-grants to teachers		
• Incentive grants		
• Equipment purchases		
• Internships for teachers		
Administrative support		
• Data processing		
• Landscaping		
• Management consulting		

continued

Activity	Current Involvement	Potential Involvement
Information on current volunteer activities with schools:		
• Volunteer as individual		
• Service on school board		
• Participation in PTA		
• Other		
Work-Study opportunities (Indicate company department, number of positions available, types of skills required, and training possibilities.)		

The company resource survey has two purposes: To find out what employees are currently doing in the schools and to give you some indication of what they as individuals and as company administrators are willing to do.

You can assure the success of this meeting by handling it as you would any other kick-off session. Pleasant surroundings, a definite agenda, and an atmosphere of interest and commitment will go a long way toward getting the project off the ground. The key element to remember is that the people you are meeting and with whom you will be working are professionals. Their capabilities and skills in their profession are equal to yours. Similarly, their desire to begin a fruitful cooperation matches yours.

Most likely, the first meeting between your groups will be devoted to the formal aspects of initiating the collaboration—introducing the participants, describing the company and the school or schools involved, perhaps a tour of the site where the meeting is taking place (company or school), and then an audiovisual presentation or other informational introduction to the other partner. Participants should reaffirm at least their general commitment to the principles of collaboration and present the general outlines of what they expect to achieve.

At this time or at a second working session, the two parties will have to agree on a strategy for planning, funding, and implementing their program. Parties to these decisions will probably include the corporate officer in charge and the coordinator of volunteers, if these functions are separate, and a representative of the superintendent (perhaps the assistant superintendent for curriculum and instruction), the principal, and a school coordinator of teachers. Often school districts will have someone on staff who coordinates programs between the school and outside agencies. His or her experience will be valuable.

At either the first formal meeting or the second working session, a decision must be made on the kind of programs to be developed.

Before the meeting, your company should have determined its answers to all or most of the following questions:

1. Will your company participate in an existing collaborative council?

2. Will your company work to establish a local collaborative council to aid education?
3. If your company is going to work with a collaborative council, will you also work with individual schools?
4. Will your company work with one or several schools?
5. Is there any existing program such as Junior Achievement that might facilitate company involvement with the schools?
6. What kinds of projects is the company management interested in undertaking?

School Needs Assessment

Volunteer support
- Classroom activities in curriculum areas (specify areas of interest)
- Tutoring
- Career Education/Vocational Education
- Other areas: library, clinic, athletics, transportation
- Mini-courses for faculty and students
- Service on advisory groups

Special projects
- Awards
- Athletics
- Art and music
- Publications
- Sponsoring student groups

Administrative support
- Management consulting
- Landscaping
- Data processing

Field trips and tours

Financial support
- Equipment purchase
- Scholarships
- Mini-grants program for teachers
- Incentive awards
- Internships

Work-Study opportunities (specify desirable placement areas)

Naturally, if the initial effort is to be confined to work within an established collaborative council or to setting up such a council, then the involvement of school and company personnel below the superintendent and corporate officer levels will be for informational purposes only. If a further expansion of effort is envisioned for the future, however, this is a good way to keep everyone informed.

It is best to begin discussions of programs sometime during the school year preceding any classroom activities. That is, planning for a program in October should begin sometime during the preceding spring and planning for the spring term should start in the fall. The dynamics of the school year make October-November and February-April better times for in-classroom or other work with students and teachers. In September, December-January, and May, such concerns as starting up, holidays, and winding down take precedence. Activities with administrators can profitably take place during the summer, but they too tend to be heavily burdened in September and May-June.

The results of the school needs assessment and the company survey will form the basis for planning specific activities.

ROLES

Collaboration usually involves three levels of company support: the chief executive officer, the corporate officer in charge of the initiative, and the coordinator of company-school activities. Each has responsibilities and each is vital to the success of the project. Of course, specific responsibilities will depend on the nature of the activities undertaken. Bear in mind also that in many companies the responsibilities of the corporate officer in charge and those of the coordinator may not be divided as neatly as they are here, and on occasion they may be assigned to one individual. Of course, volunteers are also essential and their role will be discussed in conjunction with the various kinds of company-school activities.

The Chief Executive Officer

The role of the CEO will be the same no matter what the size of the program or the number of employees involved. The CEO's responsibilities will be to:

1. Determine the company's general level of commitment.
2. Authorize use of company resources.
3. Assign a corporate officer to monitor development of the program.
4. Enthusiastically promote company participation.
5. Support means of rewarding employee participation.
6. Make initial formal contact with the school or school system (or designate a responsible officer to do so).
7. Thank school and company participants, in writing if possible, at the beginning of collaboration and as individual programs are completed.
8. Publicize company participation.

Once the program is underway you can encourage your CEO to stay in touch with the program, participate in activities, acknowledge employees who take part, recruit additional middle and upper level professionals to take part, and reaffirm the company's commitment at regular intervals.

The Corporate Officer in Charge

Who has the responsibility for developing a plan for company-school collaboration? The company role of this individual will vary according to

company size and structure, past company-school cooperation, and the personalities and skills of those involved. In some companies, this officer will also coordinate the school activities; in others, he or she will be the head of a department charged with a variety of corporate social responsibilities and will surpervise the coordinator.

In general, however, the corporate officer in charge will come from one of three areas within the company: human resources; corporate contributions; or the department of corporate social responsibility, public involvement, or public affairs.

The corporate officer's responsibilities will overlap with those of the CEO on the one hand and those of the coordinator on the other. They include:

1. Specifying the company's level of commitment—how many departments, how many hours, how many people, how many schools?
2. Surveying current company involvement.
3. Designing the master plan for company activities.
4. Developing a budget.
5. Promoting the program and encouraging additional participation.
6. Keeping the CEO informed of progress.
7. Making initial informal contacts with the school district or school if this has not been done. ("Formal" contacts are reserved for the CEO.)
8. Supervising the development of the master plan.
9. Selecting or serving as the coordinator of company-school volunteer activities.
10. Establishing a plan for publicizing activities within the company and to interested parties outside the company (other companies, the press, educators, parents, community groups).
11. Notifying the ACLI Education Division of company initiative.
12. Making the continuing personal commitment of time and energy to ensure success of the program.
13. Participating in program activities as needed.

The Coordinator of Company-School Activities

Is there anything left for the coordinator to do? Indeed, he or she will be kept busy arranging and overseeing the day-to-day operations of the program. Specifically, the coordinator can expect to perform the following tasks:

1. Draw up a detailed plan of action.
2. Recruit volunteers.
3. Assign responsibilities.
4. Allocate resources.
5. Work with the school coordinator (his or her opposite number).
6. Become familiar with the collaborating school.
7. Coordinate company side of scheduling, placement, time, changes, and evaluation.
8. Promote the program.

9. Stay on top of day-to-day activities.
10. Arrange for follow-up: thank participants, distribute copies of any publicity about the program.

The School People

Company personnel will work primarily with three individuals from the schools: the principal, the school coordinator, and the teacher.

The principal is as important to the success of the collaboration as the chief executive officer. He or she must be willing to support its operations with the resources that the office commands. The principal chooses the school coordinator and keeps in touch with the day-to-day program activities. The principal can also be a spokesperson for the project to other schools and other companies.

The school coordinator is the counterpart of the business coordinator. He or she needs the same kind of enthusiastic commitment to the program and its principles. The school coordinator is the link between the company and the business, and between the teachers and the business volunteers. The school coordinator's responsibilities are similar to those of the business coordinator.

The teachers' support and commitment are essential to the success of any program involving students. By including teachers in program-planning sessions and seeking their advice on content, materials, and teaching strategies, you can enlist their support and benefit from their experience. Programs that are not supported by the classroom teacher will not succeed.

Beyond these three categories of individuals, your local school district may already be affiliated with the National School Volunteer Program, Inc. The NSVP can provide valuable advice and assistance about developing and operating volunteer programs. NSVP is a national non-profit education association building partnerships between public education and the community through the work of its membership of parents, retirees, company employees, educators, and college students.

Technical assistance services available from NSVP include publications, slide-tape presentations, research on model programs and school legislation as well as training for volunteers and volunteer coordinators. NSVP can also provide comprehensive training and program development assistance for leaders of school volunteer programs through the National Academy for Volunteers in Education.

Companies can contact NSVP for more information about its services.

What to Look For in a Coordinator and a Volunteer

- **Interest in education**
- **Commitment to young people**
- **Energy and enthusiasm**

continued

- Responsible position in the company
- Creative and innovative thinking
- Communication skills
- Willingness to make the necessary time commitment
- Support for the goals of the program
- Consistency, commitment, cooperation

For more information on working with volunteers:

National School Volunteer Program, Inc.
300 N. Washington Street
Alexandria, VA 22314
703/836-4880

There are no rules for successful collaborations. There is no one right way to proceed, nor is there a single formula for success. There are many successful programs—all different and all flourishing—and they share certain characteristics even if their structure, program, goals, and activities vary widely. The chart can help you identify some factors that will affect the success of your collaboration.

Factors that *Do Not* Necessarily Affect Success of Cooperative Programs

- Number of participants or number of schools involved
- Who initiated the project
- Amounts of money spent
- Where activities take place
- Problems—if they are solved with good will and flexibility

Factors that *Do* Affect Their Success

- Commitment from the top
- Planning
- Openness
- Enthusiasm
- Creativity
- Respect for educators
- Liking for young people
- Company support up and down the line

IV. WORKING IN THE SCHOOL

You have chosen a school to work with, and your company and the school personnel are in general agreement about your collaboration. What kinds of programs can you develop?

Your company can participate in four categories of programs: administrative assistance, staff development, classroom activities, and special projects. Administrative assistance and staff development concern teachers and administrators. Classroom activities and special projects focus on students.

There are two additional areas of participation that, while they involve activities with students, are different enough in content and approach to justify separate treatment. They are career education and similar curriculum areas and national programs. Many of the existing company-school collaborations fall into these two categories.

Some exemplary programs have activities in each area. Others concentrate on one or two areas. You will of course design your program on the basis of what you and the school representatives agree upon. Many programs begin small and then expand. Success attracts new ideas and new volunteers. Interestingly enough, survey respondents whose companies concentrate on work with classroom activities often indicate a desire to begin providing administrative assistance or staff development support, while companies initially involved in these areas express a willingness to work with students.

While the examples given are drawn from real programs as reported in the survey, they should in no way limit what you and your company consider doing. Use them as guidelines and suggested approaches, and then design a program to meet your criteria and those of your school.

The advice given here will be of use to you whether you will be coordinating the work of others or participating as a volunteer yourself. If you want further information from companies currently working with the schools, the accompanying resource section can help you locate them.

ADMINISTRATIVE ASSISTANCE

When your company helps redesign the interior of a school building to maximize energy efficiency and accommodate declining enrollment, you have provided administrative assistance. The same is true if you cooperate with the school or the school district to increase efficiency, modernize office procedures or improve day-to-day operations. Business personnel, with their grasp of management techniques, have much to offer the schools.

Companies can offer administrative assistance in the following areas:

Physical plant

- Design of new facilities
- Redesign of existing structures
- Updating of heating and cooling systems
- Assistance in landscaping
- Office design
- Safety measures

Management

- Financial management
- Employee benefits
- Insurance
- Updating office procedures
- Computerization of personnel, payroll, and student data
- Public relations activities
- Publications and printing
- Equipment purchases
- Sponsorship of staff planning activities

Student affairs

- Design of attendance monitoring system
- Computerization of course offerings and enrollment data

Companies offering administrative assistance can make a real difference in the efficient operation of a school. For example, improved attendance monitoring procedures—which a company can help develop—please parents, improve student discipline and, by reducing absenteeism, improve school finances (since funding is often allocated on the basis of average daily attendance). Updated office management procedures mean more efficient offices and staff time that can be used for more productive tasks. When teachers have fewer forms to fill out, there is more time for teaching. Savings on heating and cooling bills can be put to good use.

STAFF DEVELOPMENT

Staff development activities increase the skills and knowledge of teachers and administrators. Providing computer workshops for math and science teachers, enabling administrators to take part in your management development program, supporting seminars to improve teachers' classroom skills, even providing summer internships so teachers can experience the business environment—these activities can be described as staff development. They improve the professional abilities of the people who work in the schools.

Suggested staff development activities include:

- Tours of company sites
- Workshops on business techniques for career education teachers and counselors
- Policy development seminars on insurance-related curriculum issues such as financial planning education and health education
- Summer seminars on business techniques
- Internship and summer employment opportunities
- Personal financial planning seminars
- Career change guidance
- Seminar series on communications skills, data processing, budget preparation, accounting procedures
- Workshops on management, personnel, public relations, advertising, marketing, investing, and insurance

Exemplary Staff Development Programs

I

A community business-education partnership group sponsors a business-education academy through which member companies, including a life insurance company, design and staff management skills seminars for school system administrators. Topics include personal relations, communications skills, time management, leadership skills, marketing, and public relations.

II

A life insurance company designs and implements a summer program to familiarize teachers from all disciplines with business and business concerns. Teachers spend six weeks working on routine assignments or special projects in the company related to their particular skills. These are salaried positions, but the purpose of the program is familiarization, not career change. In fact, the company advises that admission be limited to teacher-candidates who are committed to long-term teaching careers.

III

An insurance company is helping classroom teachers use arts and humanities concepts in their teaching. Music, theater, dance, and the visual arts are related to subjects in the basic curriculum. Teachers (and students) attend workshops and performances aimed at linking communications skills with the arts and humanities. The insurance company sponsor provides the resource materials and financial support for the performances as well as personnel who teach the workshops.

A point to remember in approaching the schools is that an offer of administrative or staff development assistance can be an excellent first step toward full-scale cooperation. You should not overlook the possibility of offering workshops or seminars on curriculum-related issues of concern to the insurance industry. Policy development topics such as the

need for financial planning education and health education are of interest to both educators and company personnel.

The ACLI Education Division has several staff development and education policy development resources to help you. For example, your company can assist schools to plan and implement comprehensive staff development for school personnel in personal and family financial education, a topic taught in social studies, consumer education, home economics, and business education. The Council has published manuals containing the materials necessary for an 18-hour staff development workshop. Your company can offer to underwrite such a workshop and/or provide personnel to discuss such things as risk management and insurance, as well as issues like social security and retirement planning.

Offering a personal financial planning seminar for teachers and administrators is another good way to begin. The accompanying list of ACLI materials will help you form other plans. You can also call on the Education Division for ideas.

Staff Development and Education Policy Development Resources

The use of these resources is an ideal way for the insurance business and educators to work together. Companies can offer the materials, designed for use by educators, to local school districts, schools, colleges, and adult education centers, or they can sponsor or co-sponsor staff development workshops and policy development forums.

Staff Development Workshops

PERSONAL AND FAMILY FINANCIAL PLANNING: A STAFF DEVELOPMENT WORKSHOP FOR SECONDARY SCHOOL TRAINERS AND TEACHERS

An 18-hour workshop to help secondary school teachers improve and update financial planning knowledge and teaching strategies. The manual contains all necessary materials for six three-hour training sessions.

PERSONAL AND FAMILY FINANCIAL PLANNING FOR MULTICULTURAL ADULTS: A STAFF DEVELOPMENT PROGRAM FOR ADULT BASIC EDUCATION TEACHERS AND TRAINERS

A 12-hour workshop to train educators of adults to help recent immigrants and Americans from differing cultural backgrounds deal with money management and financial planning. This manual includes a detailed leader's guide, as well as activities and materials for use in four training sessions.

Multimedia

DECISIONS, DECISIONS: PREPARING FOR A LIFETIME OF FINANCIAL RESPONSIBILITY

A color slide-audiocassette package to serve as an orientation to financial planning education. It can be used at PTA and other education meetings and as an introduction to staff development workshops.

continued

Education Policy Development Resources

FINANCIAL PLANNING EDUCATION: A CHALLENGE FOR TEACHERS, TRAINERS, AND INSTITUTIONS

A series of papers by nationally known educators examining the importance of financial planning education in the nation's schools.

RECOMMENDATIONS FOR SCHOOL HEALTH EDUCATION: A HANDBOOK FOR STATE POLICYMAKERS

Guidelines and recommendations from a national task force of health educators on developing comprehensive school health education programs.

STATE POLICY SUPPORT FOR SCHOOL HEALTH EDUCATION: A REVIEW AND ANALYSIS

Report and analysis of the major findings of a 1981 national school health education survey focusing on the state education agency's role.

Further information about these materials, their prices, and availability, can be found in the ACLI *Catalog of Education Materials*.

Not only do these kinds of activities benefit both partners but the contacts and goodwill developed during their operation will spill over into the planning process for the next project. Both sides will be more comfortable in the working relationship when the first project has been a success.

While enhanced teaching skills, more realistic career education preparation, and improved teacher morale ultimately do benefit students, a company focusing solely on collaborative activities with administrators and teachers will miss out on the challenge of student-business interaction, as will the school. Most companies will not want to miss out on that challenge.

Strategies for Successful Projects with School Personnel

1. Build support for the program within your organization. Appoint a coordinator and publicize your project.
2. Arrange to meet school people for the first time in a relaxed atmosphere, perhaps for lunch.
3. Make sure the program is publicized in the school. Supply materials if necessary.
4. During the first meeting with the participants, introduce yourself and the company, explain why the company wants to do this and what it expects in return.
5. Avoid appearing to make a sales pitch for your company.
6. Ask for and answer questions: where, when, how, how many times, how long? Be specific about expected time commitments and outside work, if any.
7. Arrange for participants to meet senior management.

continued

8. **At the end of the program, allow time for oral and written feedback. If the project warrants it, pass out evaluation forms.**
9. **Give participants something to take away: course summary materials they can use in class, names and addresses of company personnel they can call on in the future.**

CLASSROOM ACTIVITIES

You and your colleagues can participate in classroom activities as diverse as the classrooms in which they take place. As used here the term refers to a planned session or series of sessions (the key word is *planned*) in which business volunteers work with students on a specified topic or subject matter to reinforce the teacher's instruction. The planning or curriculum development activities will, of course, take place with the cooperation of teachers or other school personnel.

Activities can require one person or several people working separately or in groups, in a one-time appearance or a series of appearances. The classroom can be located in the school building, in a company meeting room, a public building, or any other space appropriate to the activity's purpose. A number of classroom activities involve work-study arrangements where teachers and students spend the day at a work site dividing their time between academic studies and on-the-job training.

The subject matter can be math, science, computers, careers, language arts, French, business, health or any other subject in the curriculum. Perhaps someone in the company has a special skill or ability that could be the basis for classroom instruction. The activities will most likely take place during the school day, but not always. Again, there are no formulas or models.

Classroom activities are perhaps the most difficult activities to get started, but that should not deter you. When successful, the rewards can be the greatest. People who have not been in a classroom since they sat facing the blackboard are often uneasy about standing on the teacher's side of the desk. Proper orientation and some training can take care of their hesitations. Students are supposedly noisy, unruly, and disruptive. In many instances they have had a bad press. They are a demanding audience, but a very satisfying one. When you have made a hit, you know it.

The company coordinator can help lessen any anxieties the volunteers may have by carefully orienting them to their classroom experience. Give each new volunteer (and any veteran) a fact sheet describing the program in which he or she is participating and outlining how it fits into the company's total school program. There is no need to make this an elaborate document, but you can provide answers to questions in advance by providing information on who, what, when, where, why, and how.

The fact sheet can cover the following topics:

1. Description of the activity or program

2. Goals of the program and of the company effort
3. Participants: names and functions of company and school participants
4. Profile of the school and students involved
5. Instructional objectives: how the activity fits into the school curriculum
6. Expected benefits to the students and to the company

Your best source of information will be the teacher you are to work with. He or she knows as much about teaching as you know about your job.

Purpose

Whether you yourself will be teaching or whether you will be coordinating the work of others, it is important to realize why the volunteer is in the classroom. The primary purpose is to reinforce the teacher's and the school's instructional goals. You are not there to recruit new personnel or to show the company flag. You can relieve the teacher of any doubts about the volunteers' sincerity by making clear before you begin that you are there for an educational purpose. Similarly, by stressing this purpose to the volunteers, you can underscore for them the usefulness of their efforts.

Your classroom activities also serve other important goals:

1. To provide information about business, its services, products, and procedures not readily available to teachers and students.
2. To demonstrate how the basic skills are essential to successful performance on the job.
3. To provide career role models and career information.
4. To improve student morale. Remember how a break in the routine enlivened your school day and how advice from nonteachers carried more weight?
5. To improve teacher morale by providing contacts with professionals from other fields.
6. To provide a real link between business and education. You will speak with authority on school issues because you will have been there.

Procedures

Advance planning is your key to success. Begin planning the classroom activity by setting up a meeting between the teacher, other volunteers, and yourself. Allow time for brainstorming. What are the teachers' expectations and ideas for the program? What are the volunteers' suggestions? Decide together what you will do and how you will structure it.

Here are the things you need to accomplish in your planning session:

1. Set the goals: What are the specific instructional objectives you wish to accomplish?
2. Design the activities: How many sessions? How many volunteers? Where? What will be covered?
3. Decide on presentation techniques: discussions, interviews, question and answer sessions, films, tapes, slides, other audiovisual techniques, a tour or other outside-the-classroom experience, a combination of some or all of the above.

4. Write out or outline what each session or interaction between you and the students is expected to accomplish.
5. Develop materials: a vocabulary handout, a worksheet, a summary, a reading list.
6. Determine whether there should be any pre-session activities conducted by the teacher. Perhaps a discussion of unfamiliar vocabulary would make your session more meaningful.
7. Plan an evaluation strategy: arrange for formal or informal feedback from the teacher and/or the students as well as from the volunteers.

Teachers do this kind of planning every day and the best teachers do it instinctively. You can get a lot of guidance from "your" teacher. *Ask.* He or she wants you to succeed just as much as you do.

Tips from School People Who Have Been There:
Designing Workable Instructional Activities

1. Seek the teacher's advice.
2. Be sure everyone has agreed on the goals. Have a written statement. The effort of writing it down clarifies everyone's thoughts.
3. Plan small but think big. No single program can raise test scores, but a concerted effort will have an impact.
4. Know the audience. Seniors in high school are light years away from ninth graders. Similarly, what an advanced math class for college-bound seniors will expect to hear will differ from the expectations of a career education class.
5. Lectures are boring. Plan some other way of presenting your material. The teacher and your company's marketing people can give you ideas if you need them.
6. Get familiar with the territory. At the least, the volunteer coordinator should visit the classroom before the program begins.
7. Handouts (worksheets/notebooks/vocabulary lists) focus student attention on the highlights and provide for carry-over between sessions.
8. Time does strange things in classrooms, so volunteers should outline or make notes for presentations. Over-preparing is better than having 15 minutes to kill. Students always know when you are killing time.
9. Encourage flexibility from volunteers and participation from students. Volunteers should be able to make room in their presentations for new topics that develop from students' participation.
10. Allow for changes in future sessions on the basis of first experiences.

Finally, there are a few facts you and the other volunteers should be aware of before you go into the schools. These suggestions come from experienced volunteers and school people.

1. School buildings are not public places. There may be only one unlocked entrance or one entrance with a doorbell. Find out before you go.

2. Find out where to park and exactly how to find your classroom. Some schools have campuses with several buildings.
3. Be prepared to sign in or identify yourself. You may have to wear an identification badge.
4. Teachers do not have secretaries or uninterrupted access to telephones. Often they do not have offices, and sometimes they do not have desks. Exchange home phone numbers.
5. Dress as you would to go to your regular work. The students will expect you to look like a professional.
6. If you need audiovisual equipment, find out if the school can provide it in working order. Practice using it before your program. Best of all, bring whatever equipment you need with you. The best presentation can be ruined by a defective machine.
7. If you want to distribute materials, arrange to bring enough copies with you. Ditto for pencils or crayons or markers.
8. Since you are *not* the teacher or a substitute teacher, make sure he or she remains in the classroom. It is the teacher's legal responsibility.
9. Find out when lunch is scheduled. While *you* may not eat at 11:00, many students do and they understandably resent losing some of their lunch time when your presentation runs overtime.
10. How many times can you be flexible? School schedules change frequently. Snow days, make-up days, teacher in-service days, and district-wide testing all affect regular classroom hours. Teachers should keep you informed, but they are not perfect either.

Tips on Classroom Behavior for Volunteers

1. **Remember the age of your audience.**
2. **Do not let one or two students monopolize the discussion.**
3. **Move around. Use the blackboard (it may be green or even white).**
4. **Involve the teacher. Don't pretend he or she isn't there.**
5. **Make sure everyone can hear. Ask students to repeat or explain if you don't understand what they say.**
6. **Let the teacher handle any discipline problems.**
7. **If you don't know an answer, say so, but volunteer to find out and get back to the student.**

Choosing Volunteers

Look for people who are knowledgeable, enthusiastic, dependable, and able to communicate well. Specifically, you want volunteers who will accept the following responsibilities:

1. Attending orientation sessions
2. Working with teachers to plan instructional activities
3. Being dependable

4. Being professional; that is, keeping information about students confidential, working within school rules, refraining from undermining teacher or school discipline
5. Adapting their own work schedule to school responsibilities

Once you have recruited volunteers, you will need to select those with whom to work in a particular program. If you do not know them personally, use your company's internal network to find out about them, much as you would if you were considering them for an assignment in your department. Meet with the teacher or the school coordinator to find out the particular skills and abilities the assignment requires. Put together the best team you can for your first effort and reserve your other volunteers for the future, when you will be able to give them more guidance.

Orienting Your Volunteers

Your volunteers need to know the same things you know about the program. Get them together and explain how and why it came about, what you intend to accomplish, and how you will go about it. Explain how details of time, transportation, materials or supplies will be handled. If possible, have a joint meeting with the school personnel involved—the principal, the school coordinator, the teacher. Even better, plan a celebratory kickoff event with company and school personnel (and plan another for thank you's and congratulations when your project is finished).

In following through and keeping everyone informed of where and when they are expected to participate, send out reminders or call when there is a time lapse of more than a week between activities. Check up on whether or not things have gone off on schedule.

Programs

Some Insurance-related Topics for Classroom Projects

Social Studies	Economics	Mathematics
Taxation	Financial planning	Probability
Government and business	Profit	Statistics
Ethics in business	Consumer issues	Computers
Government and individual responsibilities	Regulation/deregulation	
Lobbying	Product pricing	
Changing lifestyles	Business investment	
Demographics		
Corporation's role and responsibility in society		

Health	Language Arts	Career Education
Health care costs	Images of business in literature and the media	Careers in insurance
Safety	Writing in business	
Self care	Oral communication	
Alternate delivery systems		
Caring for the elderly		
Ethical considerations		

What you do in the classroom will grow out of your strengths and the school's needs. There are many programs that will make the match. We can suggest only a few of them here. Personnel in each company department will have something to contribute: public relations specialists use the basics, managers use interpersonal skills, accountants use math skills, company policymakers use communication skills. All employees know how to find and keep a job. Each of these skills can be the basis for a program.

Most school systems have priorities for their instructional programs, and these generally fall into the areas of reading, math, and science. Discussions with teachers and administrators will bring out these areas of concern which can be a good place to start program planning. The suggestions given here will help you get started.

Some Curriculum-Company Department Links

Suggested Sources for Volunteers and Projects

Curriculum Area / Company Department	Personnel	Marketing/ Sales	Underwriting	Actuarial Science	Accounting	Public Relations	Management	Office Services/ Data Processing	Legal Services	Investment
Language Arts/ English Journalism/ Communications	X	X				X	X	X		
Mathematics			X	X	X					X
Economics/ Consumer Education		X			X	X				X
Social Studies/ History				X		X			X	
Computer Science	X	X			X		X	X		X
Home Economics/ Health			X							
Business Education	X	X				X	X	X	X	
Career Education	X	X	X	X	X	X	X	X	X	X

Classroom Projects

I

A company actuarial department sponsors a program for advanced math students who work with employees on *problems in probability and statistics*. Company personnel conduct class sessions in the school and there are two trips to the company location. The students become aware of the value of their mathematics skills in the world of work.

II

Twenty cooperative education students spend one week working in an insurance company in a large metropolitan area and then one week back at their high school. The company has instituted a seminar series for the students to educate them in *job-related functions and corporate expectations*. Topics such as business dress, business behavior, the importance of communications, and how the company functions as an organization are presented at the company by company personnel. The students have the opportunity to experience firsthand the importance of concepts like punctuality and professional behavior.

III

A large insurance company has donated *computer equipment* to a local high school. Company personnel are conducting classes during the school day for students and teachers. The students benefit from the *practical experience* of working with equipment and company personnel.

IV

The public relations/customer information office is assisting the teacher of a class in *marketing and communications*. Company personnel have designed a series of learning experiences for students ranging from proofreading and editing to writing copy and designing a brochure to feature a new company service. The students are able to see how the basic skills are applied in a professional capacity.

V

Through Project InVEST a *model insurance office* has been installed in high schools providing the basis for a fully accredited business education course. Students perform all the tasks involved in the operation of the office. They are supervised by teachers and advised by company personnel. The students gain practical business experience as well as a knowledge of the industry. For information:

Project InVEST
College of Insurance
123 Williams Street
New York, NY 10038
212/962-4111

VI

Company personnel have volunteered to participate on company time in a *basic skills tutoring program* at their adopted high school. The volunteer and the teacher working together tailor instructional goals for each student. The students benefit from the relationships that develop as well as the increased attention to their weaknesses.

Materials

Almost all classroom activities will require some development of materials for student use. Materials can be print or nonprint and can include slides, transparencies, videotapes, and all kinds of audiovisual productions. Of course, use of materials is not limited to classroom activities with students, for they will be needed in many if not all of the programs attempted.

Materials can be as informal as typed and duplicated lists of vocabulary or as sophisticated as the list of resources offered by the ACLI Education Division. All materials should be educationally sound, however, and they should never be designed solely to promote the image or position of the company.

ACLI Educational Materials

CLASSROOM MATERIALS ON FINANCIAL PLANNING AND MONEY MANAGEMENT

Print

Financial Planning, Employee Benefits and You A 36-page workbook for adults with a 4-6 grade reading level. The contents show how to use employee benefits to maximize financial security, and the method of presentation stresses basic reading skills.

The Money Manager: Step-by-Step to Money Management A desk-sized workchart containing guidelines for preparing a personal or family budget. For use with senior high school students and adults. Also available in Spanish (*El Asistente Financiero*).

Multimedia

The Resourceful Ones: A Systematic Approach to Financial Planning Four sound and color soundstrips with audio cassette, teacher's guide, and classroom worksheets. The unit may be used as a whole or each filmstrip may be used independently. Aimed at senior high school and junior college students, the content develops understanding of financial planning.

Facing Your Future A 10-minute 16 mm film presenting the same material as the above in a more compact format.

Choices and Decisions: Becoming a Wise Consumer Four sound and color filmstrips and cassettes or records, teacher's guide, and budget worksheets for duplication. The principles of consumer decision-making are presented to help senior high school students and adults make informed financial decisions.

Marriage and Money A sound and color filmstrip available in either record or cassette format. Designed as a discussion starter, the filmstrip shows high school students how one young couple face the financial decisions involved in marriage and parenthood.

CLASSROOM MATERIALS ON LIFE AND HEALTH INSURANCE

Print

Policies for Protection: How Life and Health Insurance Work A 32-page workbook for high school students and adults that presents basic information about life and health insurance protection.

Sets, Probability and Statistics: The Mathematics of Life Insurance A 36-page workbook with an answer key that applies mathematics to the real-life setting of the insurance industry. For senior high school students and adults.

Sets, Probability and Statistics A computer program based on the booklet described above.

Understanding Your Life Insurance A simplified textbook explaining the basic concepts of life insurance.

Sample Life Insurance Policies These samples are representative of contracts issued by life insurance companies. Whole life or term policies are available.

Career Opportunities for You in Life and Health Insurance A 24-page booklet of interviews with company employees. Designed to give students and adults information about 17 careers in the industry.

Dealing with Life Insurance A set of five card games through which students and adults can become familiar with the basic vocabulary and concepts of insurance.

Multimedia

The Basics of Life Insurance A filmstrip accompanied by a cassette, a teacher's guide, and a poster. The unit relates life insurance to financial resources, lifestyles, and responsibilities.

TEACHER'S MATERIALS

Print

Life Insurance Teacher's Kit A resource for teachers containing a teacher's guide, *Understanding Your Life Insurance*, sample policies, and a catalog of ACLI educational materials.

Teaching Topics A semi-annual newsletter for educators on such subjects as Social Security, the Economic Recovery Tax Act, Health Care in America.

Personal and Family Financial Planning for Multicultural Adults A staff development program for trainers of adult basic education and English as a second language teachers. Contains staff development manual, resource data manual, teacher's manual, and a comprehensive list of resources.

Personal and Family Financial Planning: Strategies for Teaching Sample instructional strategies for classroom teachers covering a wide range of topics.

Multimedia

Personal and Family Financial Planning: A Staff Development Workshop for Secondary School Trainers and Teachers A manual plus slide-tape to help secondary school teachers develop financial planning knowledge and teaching strategies.

ADDITIONAL RESOURCE MATERIALS

Life Insurance Fact Book A standard reference book

Source Book of Health Insurance Data A standard reference book

Pension Facts An information resource

Financial Planning Education Selected papers on financial planning for teacher educators

Adult Financial Management Matrix, Parts I and II A tool for program planners defining financial tasks, errors, and desirable financial achievements

The Baby Boom Era Report based on survey data

A CATALOG, ORDER FORM, AND FURTHER INFORMATION ARE AVAILABLE FROM

Education Services
American Council of Life Insurance
1850 K Street, N.W.
Washington, DC 20006

In general, your program of activities, whether it is a one-session, one-person exploration of careers in the insurance industry or a semester-long team-teaching computer course, will benefit from the development of thoughtfully prepared and produced materials. It is sound educational practice to give students something with which to anchor their educational experiences. A simple technique like providing note pads or folders with the program's name will enhance your program as well. Finally, the materials will help in replicating the program or describing it to others.

You need not design and produce these materials yourself. There are a number of resources currently available. The Education Division's list is particularly applicable to use by the insurance industry, and these publications can be reprinted with your company's logo if you wish. Materials prepared by other companies, trade associations, and non-profit groups are available for school use at little or no cost. One company used its experience in remedial training for its own employees to adapt materials on writing and speaking skills for use with high school students. The materials are programmed for self-instruction so students can proceed at their own pace.

Companies can also collaborate with schools or other agencies or individuals to produce materials for a specific purpose. The costs can be minimal or substantial, depending on the scope of the project and the

method of presentation. A brochure is obviously a less costly alternative than a bound 100-page book with tear-out activity sheets and reproducible masters.

SPECIAL SERVICES

Special services include all those activities and projects companies can undertake with schools that do not fit into any of the other categories outlined here. Your company probably participates in one or more of them right now.

Some examples are:

1. Awards for attendance or academic or athletic achievement.
2. Teacher recognition awards or ceremonies.
3. Assistance with school publications: providing editorial or production help with writing copy, taking photographs, designing graphics.
4. Participation in athletic programs: coaching, playing, providing facilities or equipment.
5. Book Fairs: contributing, attending, sponsoring.
6. Working with parent groups: developing career education activities and volunteer programs, and supporting their programs.
7. Providing facilities, materials or equipment: loan of the auditorium, use of copying machines, allowing bake sales or other such fundraising activities at company sites, displaying student art shows, providing schools with used or new equipment at reduced or no cost.

Finally, there is the category of financial contributions. While this industry initiative emphasizes human rather than financial resources, that is not to say that money has no place in company-school collaboration. Certainly all these programs carry some cost in released time or increased demands on company services. Many projects will require small outlays for materials or equipment, duplicating services, paper, transportation, and so on. None of them, however, is predicated on large cash donations. What is necessary is people—their commitment and energy.

CAREER EDUCATION AND OTHER CURRICULUM AREAS

There are several curriculum areas in which business and business personnel traditionally and logically play a large part. They are career education (including vocational education), consumer education, economic education, and law-related education. Of these, career education draws most heavily on business input, but business participation in all these curriculum areas is widespread. Career education, for example, covers a multitude of activities and involves business people in every kind of company-school collaboration.

Activities in Support of Career Education and Other Curriculum Areas

General Activities

- Participate in community education programs focused on problems relating to youth, such as unemployment, job readiness, motivation, self-awareness.
- Promote community support for initiating or expanding programs.
- Serve as advisory committee members to keep curriculum relevant.
- Serve as resources for classroom activities and teacher familiarization workshops.
- Provide opportunities for field trips.
- Assist in development of curriculum materials.
- Donate funds or materials.
- Assist in student community involvement projects.

In Career Education

- Develop work-study, mentor, and shadowing opportunities.
- Participate in career-related programs such as Explorer Scouts, Future Business Leaders of America, and Junior Achievement.
- Volunteer to explain your job and your company to students.

In Consumer Education

- Support efforts to provide balanced consumer and economic information on local and national issues.
- Sponsor and provide leaders for teacher workshops using ACLI materials.
- Supply information on and participate in discussions of insurance-related consumer issues.

In Law-related Education

- Assist in establishment of civil mock trial competitions.
- Supply information on legal issues related to insurance.

What career education, consumer education, economic education, and law-related education have in common is their concern for connecting students with the world in which they must function as informed consumers, responsible citizens, and employed adults. They are separate areas of study in the curriculum whose content is given equal educational weight with the more traditional disciplines such as English and mathematics.

Consumer education and law-related education are widely included in state-mandated competency testing for students. That is, students must demonstrate a specific level of knowledge and skills before they can advance to the next grade level. It is safe to say that all students currently enrolled in elementary and secondary schools will come in contact with several or all of these curricular areas before they graduate.

Career education includes all the studies, activities, and experiences related to career preparation and career choice in which a student participates while learning about work. In different school systems, career

education may be a separate area of study, it may be a philosophy of education that informs all other areas of the curriculum or it may be something in between. However it is presented, the goal of career education is to prepare students for the world of work in whatever guise they encounter it.

Vocational education is part of or one approach to career education. Educators use "vocational education" to describe programs in which students learn and perform specific jobs, often being paid for their work. "Experience-Based Career Education" is another widely used term referring to school programs whose common element is some form of on-the-job, on-site work experience for students.

Company personnel are an integral part of career education programs and, indeed, many businesses see participation in these programs as essential to their needs. School people also acknowledge that without the whole-hearted participation of the business community, career education would be a meaningless concept. The programs and activities mentioned here are grounded in the career education rationale that responsible education requires the collaboration of the formal educational system and the world of work.

There are numerous ways in which companies can participate in career education activities, and most companies are currently involved in some of them. The accompanying glossary will help you understand the range of possibilities and some of the terminology used in the schools.

Successful programs always respond to local needs.

Career Education Glossary

You can expect to run across some or all of these terms when you participate in career education activities. Program content will differ slightly from location to location, of course.

Career Awareness Day: A loosely-structured opportunity for students to meet and question representatives from business, labor, government, and industry. Often brings together students from several schools.

Career Conferences: A group of students visit a particular company or work site for a firsthand look at career possibilities.

Career Ed Club: An after-school activity introducing students to a variety of career options.

Cooperative Education: Usually refers to programs where students work part-time and attend school part-time. Schools often subdivide the programs: Business Cooperative Education, Industrial Cooperative Education, Distributive and Marketing Cooperative Education.

Distributive Education: A form of career education concerned with the "flow of goods."

continued

Executive Internship Program: Students work one-on-one with executives for a specified period of time to learn aspects of the management role.

Experience-based Career Education: An approach to career education in which on-site work experience is integrated with classroom learning.

Field Experience: Any of the on-site learning opportunities for students.

Job Fair: A half-day or longer program, often in a seminar format, through which students are given information on interviewing, filling out an application, business dress, and similar topics.

Mentor Program: Business people give students individual advice and counseling.

Shadowing: A student follows an employed person through all the activities of a typical day.

Summer Work Program: Summer jobs for students. Often tied into school-year cooperative education program.

Tours: Students, teachers, counselors visit offices and work sites.

Work-Study Programs: Any of the programs combining classroom and on-the-job experiences, either paid or unpaid.

One Life Insurance Company's Career Education Activities

- Sponsored a series of on-site conferences for teachers, students, and employees.
- Provided speakers.
- Donated funds and services for field trips.
- Provided personnel to serve on an advisory committee.
- Permitted students to shadow employees.
- Set up internships for which students received credit.
- Established a summer work program.
- Recruited students for part-time jobs.
- Served as in-school career club leaders.
- Underwrote expenses for awards ceremonies.
- Provided referrals for full-time entry-level positions.

What Makes Career Education Programs Work?

Support from the top:	Enlist CEOs, superintendents, major local employers
Input from local agencies:	Get advice from Chamber of Commerce, Private Industry Council, community partnerships

continued

Size:	Build on a model, try a pilot project, adapt a successful project to meet local needs
Participants:	Work with schools to match students' skills and aptitudes with program requirements and develop some training for company participants.
Content:	Concentrate on general employment preperation rather than hiring possibilities for your company. Coordinate work activities with basic skills: proofreading, writing reports, figuring costs.

For more information on career and vocational education programs:

ERIC Clearinghouse on Adult, Career, and Vocational Education
1960 Kenny Road
Columbus, OH 43210
614/486-3655

Consumer Education and Economic Education

Consumer education and economic education share a concern for preparing individuals to be responsible citizens in society. Consumer education's goal is to teach students the knowledge and skills necessary for them to act as responsible consumers and to influence those factors in society affecting consumer decisions. Economic education is concerned with teaching students to make informed judgments about economic issues affecting them as consumers, producers, citizens, and investors.

Just as the content of the two fields overlaps, so do the ways in which businesses participate in related school activities. Again, the list of possible areas of collaboration is intended only to suggest a range of options.

The needs of the local community and its schools will determine how a company can best participate. In general, business can serve these programs by providing resources of people and information.

For more information on business involvement in consumer education:

Society of Consumer Affairs Professionals in Business
4900 Leesburg Pike
Suite 311
Alexandria, VA 22302
703/998-7371

Coalition for Consumer Education
1314 14th Street, N.W.
Washington, DC 20005
202/387-2154

Joint Council on Economic Education

The Joint Council on Economic Education (JCEE) is a national organization whose primary purpose is teaching primary and secondary teachers how to teach economics. JCEE works through universities affiliated with its regional offices to develop curriculum materials, teacher education resources, conferences, and workshops. The fact that over half the states require some form of economic education is an indication of the council's effectiveness. The JCEE was also instrumental in the production of two widely-used educational television programs, *Trade Offs* and *Give & Take*. Further information can be obtained from:

Joint Council on Economic Education
1212 Avenue of the Americas
New York, New York 10036
212/582-5150

Law-related Education

Law-related education programs are a group of educational initiatives with the common goal of enabling students to know their rights and responsibilities under the law and to understand how the concept of law functions in our society. Programs have many different titles but share the common concern for educating students to participate knowledgeably in our legal system. In some schools there are separate law education classes and curricula; in others, the materials and concepts are infused into social studies, history or civics classes.

Company personnel can contribute in many areas, chiefly by serving as resources for classroom activities, curriculum development, and teacher education.

Law-related Education

For more information about law-related education:

American Bar Association
Youth Education for Citizenship Committee
1155 East 60th Street
Chicago, Illinois 60637
312/947-3961

NATIONAL PROGRAMS

Finally, there are company-school collaborations you can group under the heading "national programs." These are structured programs with specific goals that operate on the national level and provide a ready-made opportunity for company-school cooperation. They include: Upward Bound, INROADS Inc., Explorer Scouts, Future Business Leaders of America, Junior Achievement, and its full-grown offspring, Project Business. There are others, but these are perhaps the most widespread. Each of these programs has a pre-determined and structured agenda of purposes and activities into which a company or individual "buys" when it agrees to participate.

The advantages and disadvantages of collaboration through these mechanisms come directly from these characteristics. Companies know exactly what they are expected to do before they sign on in Project Business, for example. They can be sure of the objective of their efforts in Upward Bound or INROADS. On the other hand, the free-standing nature of the programs keeps the business or individual from getting involved with the schools themselves. There is little scope for experimentation, flexibility or creativity. Many companies have resolved what is only an apparent problem by participating in one or more of these highly structured programs and also working to develop more multi-faceted relationships with schools or school systems.

Junior Achievement

Junior Achievement, Inc. is a program in which high school students learn about the free enterprise system by operating their own small businesses. Volunteers from local businesses assist the students. Usually known as JA, the high school program can be one of the easiest and most productive ways in which business and schools collaborate.

The traditional JA program lasts one year and meets after school. The range of goods and services offered by JA companies is enormous; T-shirts, desk sets, furniture, and publishing and banking services are only a few of the offerings. Most companies show a profit.

Businesses support JA in three ways: tax-deductible financial contributions, loaning executives on salary for administrative work, and encouraging employees to volunteer.

JA also sponsors several other programs:

1. Project Business—A one-semester economics course for eighth and ninth grade.
2. Applied Management—Economic education activities for college students.
3. Economic Awareness—Awareness activities for the general public.
4. Job Education—Providing summer jobs for inner-city high school students.

JA and Project Business (described separately) are two of the most common collaborative efforts. JA gives business personnel a firsthand acquaintance with students that continues over the school year. Many high schools grant their students credit for participation. JA is attractive to students who enjoy the contact with business, the fact that it is co-ed, and the opportunity to make "real life" decisions. Business people like the freedom of working with students outside the classroom and being able to achieve measurable success when the student company shows a profit. The impact of the program on the school, the school system or the community as a whole, however, is limited.

Project Business

Project Business, a program sponsored by Junior Achievement, Inc., brings business executives into the classroom to teach a pre-packaged economics education curriculum for eighth and ninth grade students. The program's stated objectives are:

1. To familiarize students with the values and responsibilities of the business system
2. To demonstrate the relationship between business, education, and the community
3. To provide students with increased motivation to develop career-related skills
4. To supplement the formal education experience with direct exposure to business and business people

Volunteer consultants from business take charge of a classroom for one class period a week over a 12- to 15-week semester. The course content is designed to supplement existing social studies, economics, civics or mathematics curriculum. The course outline and basic lesson plans are provided by Project Business. Consultants are given introductory training and then assigned to a class. On the average, the consultants spend ninety minutes preparing for each classroom session.

The following topics are included in the current program:

1. The nature of economics
2. Different economic systems
3. Principles of supply and demand
4. Competition
5. Consumerism
6. Money and financial institutions
7. Career exploration

Class sessions are divided between Discussion Units and Action Units in which students participate in classroom activities or field trips. Volunteer consultants are free to experiment with the Project Business curriculum and improvise on the basis of their individual business experience.

Project Business is financed by the company furnishing the business consultant to teach the class. The participating school pays any transportation expenses arising from field trips.

Project figures for 1982-83 show 123 cities involved, including 250,000 students and over 5,000 businesses. This is one of the largest single efforts in the field of business-school collaboration. The advantage to participation is its size, the validity of its tested curriculum, and the fact that schools and companies continue to find their participation satisfactory enough to return for more. The disadvantage to this approach lies in the fact that it does not clearly lead to a more integral involvement in schools, nor does it usually involve more than one individual per semester per company. Most companies will eventually want to broaden their participation beyond Project Business.

Future Business Leaders of America

Student members of Future Business Leaders of America share an interest in business and a desire to learn more about careers in business than is available in many high school business curricula. The association promotes a close alliance of students and business representatives that helps members investigating careers in business. Phi Beta Lambda is the post-secondary division for students working toward certificatory or college degrees in business.

There are more than 8,000 local chapters throughout the United States and overseas that function under the supervision of state chapters. The total membership is about 200,000. National contributors include the American Council of Life Insurance, the Coca-Cola Company, and Phillips Petroleum Company as well as many other prominent businesses.

The association's activities are aimed at giving students the skills necessary for success in the business world. Members participate in state and national competitions, attend conferences and workshops, and work with successful role models in business.

FBLA goals are stated as follows:

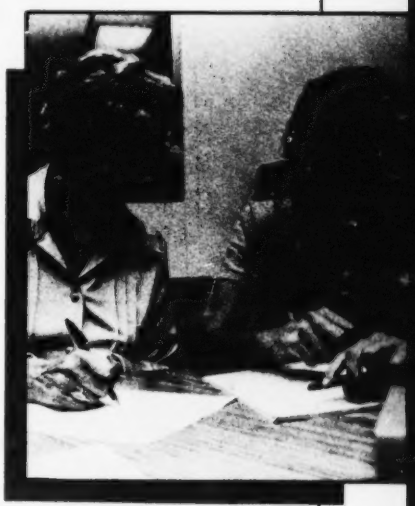
1. To facilitate the transition from school to work
2. To create more interest in and understanding of American business enterprise
3. To assist students in the establishment of occupational goals
4. To develop competent, aggressive business leadership
5. To strengthen the confidence of students in themselves and in their work
6. To encourage members in the development of individual projects that contribute to the improvement of home, business, and community
7. To develop character, prepare for useful citizenship, and foster patriotism

8. To encourage and practice efficient money management
9. To encourage scholarship and promote school loyalty

Participation in FBLA is a good way for companies to begin work with a career education program in the schools, but it is primarily an after-school activity rather than an integral part of the school day.

Project InVEST

Project InVEST (Insurance Vocational Education Student Training) is a simulated model insurance company and agency office that offers students a way to prepare for careers in the insurance industry. Students work with the auto insurance business as subject matter during a fully accredited high school business education course meeting two class periods a day for a full year. The program is administered nationally by the College of Insurance, an accredited institution offering associate, bachelor's, and master's degrees.



Students establish and operate an insurance company and perform all the business and office tasks necessary to set up an agency, sell and issue policies, process claims, and answer customer inquiries. The optimum number of participants is 24, and each student serves in rotation in five departments: reception, policy writing, underwriting, accounting, and office management.

The goal of the experience is to practice and increase business and office skills learned in other classes and to teach insurance concepts while introducing career opportunities in the insurance business. An analysis of participating students showed that one-third of the graduates began working in the insurance field, one-third went on to college, and one-third were employed in business other than insurance.

Materials are provided, including a student text, a teacher's guide, a programmed instruction book, and an audiovisual course on automobile rating procedures as well as all necessary insurance and general office forms.

Project InVEST was begun in 1970 as a joint project of the Los Angeles Unified School District and the Independent Insurance Agents and Brokers Association of Los Angeles. It has now spread across the country and is administered by the College of Insurance.

Funding can come from a variety of sources: the state department of education, universities, and voluntary contributions from local businesses. The local sponsor also helps the school set up a steering committee to help organize the project and an advisory committee to work closely with the teacher and students involved.

Support for and participation in Project InVEST is an excellent means of implementing school-business collaboration.

Upward Bound

Upward Bound is a national, federally funded effort to improve the educational opportunities of disadvantaged youth. The high school component is designed to prepare young people with low-income backgrounds and

inadequate academic preparation for education beyond secondary school. Program specifics vary from location to location, but activities are usually focused on providing career information and leadership training as well as a broad range of academic and support services, sometimes including financial aid.

A typical program operates a mini-high school on Saturdays during the school year and a six-week residence on a college campus during the summer. Career and leadership activities are part of these experiences.

Business participation comes through appearances at career days and career fairs, service as resources on particular industries, and membership in advisory and policymaking groups. Companies also provide opportunities for shadowing. Business representatives often come to Upward Bound as interested individuals and remain as links between the program and their company. In addition, many companies work with projects like Upward Bound because of the opportunity to expand their contacts with minority hiring prospects. Contacts have been initiated on both sides: companies contact Upward Bound for minority referrals and the programs use participating companies to give their students work-study jobs, summer employment or full-time work. Companies in urban areas are particularly likely to be involved for this reason.

Upward Bound is a valuable program for the students involved but it, too, has a limited impact on the more general needs of the schools. Many companies combine support of Upward Bound with other involvement.

INROADS Inc.

The INROADS Inc. program gives representatives of local businesses an opportunity to work with college-bound and college minority students. Under auspices of the program, representatives of local businesses set up internships for students in business and engineering and provide career counseling. There are offices in ten major cities.

The secondary school component helps college-bound students prepare for college and jobs. Pre-business and pre-engineering programs are open to above-average high school students who plan to attend college and are interested in a career in a business or technical field.

In a typical program, inner-city juniors in high school who plan to major in business participate in a six-week summer program at a university where they study accounting, advanced math, computer science, and marketing, and attend workshops on topics such as public speaking, test taking, and interviewing skills. The program demands high achievement and hard work from the students. Many of those who finish the high school program enroll in the college program, which has a similar emphasis on academic achievement and a high level of career preparedness.

Businesses provide summer employment, and individuals participate as counselors, tutors, on-the-job mentors, and members of advisory committees.

The program is very successful with individual students because of its high selectivity and the development of one-on-one relationships focused on an individual's strengths and weaknesses. These characteristics, however, currently keep the program from affecting large numbers of students. The national staff is working to expand INROADS by developing a model program for schools that will include larger numbers of students.

Explorer Scouts

Explorer Scout Posts and their programs are familiar to almost everyone. The programs applicable to insurance company-school collaborations are usually oriented toward career exploration. Their goal is to familiarize students with the insurance industry and enable them to experience the activities involved in such a career.

In a typical program, twenty to thirty scouts meet at the company after school for two hours twice a month. They meet with representatives of the various departments and get a firsthand view of company operations. While data processing and accounting are the most popular company departments, topics for meetings can include:

1. Marketing and sales
2. Legal department
3. Actuarial science
4. Personnel
5. Underwriting and risk selection
6. Policy issues
7. Office services and data processing
8. Claims adjustment
9. Management
10. Accounting
11. Preparing for a career in insurance

The benefits from participation in scouting accrue primarily to those directly involved—the scouts and their leaders. The drawbacks lie in the fact that there is little impact on either the company or the school as a whole.

National Programs

For more information about Junior Achievement and Project Business:

Junior Achievement, Inc.
550 Summer Street
Stamford, Connecticut 06902
203/359-2970

Information about other national programs can be obtained from:

Future Business Leaders of America
P.O. Box 17417-Dulles
Washington, DC 20041
703/860-3334

Project InVEST
The College of Insurance
123 William Street
New York, NY 10038
212/962-4111

Upward Bound
Division of Student Services
Office of Institutional Support Programs
Office of Assistant Secretary for Postsecondary Education
Department of Education
400 Maryland Avenue, S.W.
Washington, DC 20202
202/426-8960

INROADS Inc.
P.O. Box 837
Barrington, Illinois 60010
312/663-9896

Exploring Division
Boy Scouts of America
1325 Walnut Hill Lane
Irving, Texas 75062-1296
214/659-2000

You are now in a position to begin developing your company's activities. Remember to work closely with the teachers and administrators in your school; their advice can be invaluable. Also, as you develop and implement your program, build in means of evaluating its strengths and promoting its successes. By doing so you can strengthen your program, improve your company's position in the community, and contribute to the industry's role in education.

V. CAPITALIZING ON SUCCESS

Once your project is operating in the schools, you will want to use your successes to build for the future. There are three strategies to help you: evaluating your activities, promoting your efforts, and cooperating in the ACLI initiative.

EVALUATION

It is important for the integrity of your program to include evaluation as a part of your planning from the very beginning. Evaluation of company-school projects is difficult, but not impossible. There are two approaches to take: evaluate what is happening during the program for the purpose of making needed changes and assess the relative success or failure of the project after it is over. In taking both approaches, a company will maximize the impact of its efforts and be better able to justify future collaborations.

The company and the school should share in the evaluation of programs. Both parties are equally concerned about the process and the results.

Evaluation of education programs has five major concerns:

1. What actually took place? Did the activity/tour/job fair take place as planned? If not, why not?
2. Did your materials serve the purpose they were meant to?
3. Did the students (or teachers or administrators) achieve your instructional goals?
4. Did everyone involved have a good time?
5. What can you do to make it better next time?

By attending to concerns like these, by taking notes, and perhaps by sending a memo to the teachers and to your company colleagues asking for their responses, you will not only have a record of what happened but also a place to begin planning your next project. Of course, if you are involved in a long-term program to reduce absenteeism or to increase employability of high school graduates, then you will have measurable outcomes to evaluate.

In addition, you may want to evaluate your program from the point of view of how well it is achieving the company's goals for the collaboration. While this is more difficult to do, the following questions can be answered:

1. Are the individual projects integrated into a whole program of company involvement?
2. Are they becoming a recognizable part of the school curriculum?
3. Have any of them been repeated successfully?
4. Is commitment to the collaboration growing?

If your answers to these questions are negative, then you might want to back up a bit and see if you can discover where you went off the track. When you have given attention to evaluation at each stage of the process, this will not be hard to do.

The results of your evaluation will give you information to use in planning your next projects and promoting your past successes. You can make good use of your evaluation results by reporting them at a public meeting of the school board or other school group. Your program and your company can benefit.

PROMOTION

You will want to promote your program within your company, within the industry, within your school and its constituency, and within your community. Each audience will need a different strategy. The motives for your promotion can vary from getting good publicity for the schools, to publicizing the company's effort, to encouraging other companies to begin projects of their own.

Keep people in the company aware of what is happening. Arrange for a write-up in the company newsletter. Circulate memos describing your volunteers' achievements. Hold a recruitment session at which students and teachers describe the program. Arrange a concert or art show with the music and art provided by students at your school. Ask your chief executive officer to preside at an awards ceremony or "graduation" for your volunteers and their students at the end of the year. *What* you do is not as important as *how* you do it. You can put your program in the best light by emphasizing how enthusiastic the volunteers are and how the students are eager to be included in the next project.

You can also encourage other insurance companies to get involved; you can give them useful advice. The Education Division of ACLI can help you get the word out.

The school has its own public information network. Tap into that by providing copy or photographs they can use. Invite school system photographers to your events. Develop contacts with the Board of Education's communications people. Find out how to get on PTA program agendas and then use some of your time to encourage other parents to get involved in the schools through their companies. Your company and the insurance industry can become a recognized leader.

Your community needs to know what is going on in the schools—the good as well as the bad. Your company and your school will already have contacts with the local news media and they should be activated. Major metropolitan dailies often include special sections featuring local and community news where your project can be mentioned. Find out which suburban or community newspapers come into your students' (and your co-workers') homes and submit copy and photos to them.

Make yourself or other volunteers available for speaking engagements with the Chamber of Commerce, the Rotary Club or other civic groups. You can use this opportunity to promote the schools, your partnership, and the concept.

Most companies will not want to be perceived as promoting themselves through the schools. The solution is to publicize the people involved, not the institutions. Center your publicity efforts around the students who successfully complete programs or the teachers who win mini-grants.

A good general strategy for raising public consciousness of the effort is to create an image for the project. Develop a name or design a logo. Your publications people can help; so can the art or writing classes in your school. Using a logo to mark your handouts, brochures, and folders will help your program build a self-sustaining identity.

EDUCATION DIVISION ACTIVITIES

You can also keep your momentum going by enlisting the support of the Education Division of the American Council of Life Insurance. Their staff is committed to strengthening the industry's initiative, and they can be a useful resource.

The Education Division will help you in the following ways:

1. Information about your program will be circulated to other members.
2. You will be referred to a colleague who can advise you, saving time, resources, and effort.
3. The staff will help you identify and use appropriate materials published by the Council.
4. The Council will consider developing materials for use by companies if a general need is made known.
5. The staff can facilitate your access to educators and professional organizations.
6. The Education Division monitors legislative developments that can affect your efforts.
7. Your successes can be published as part of the industry-wide effort, gaining visibility for the industry as a whole.
8. By collecting information from all the programs in operation, the Division can assess the effectiveness of the initiative for the companies and the schools.
9. The staff has access to resource materials from other organizations.

The survey respondents and the educators who contributed to these resources have provided the fruits of their experience. They have succeeded in creating projects that serve their respective constituencies well, projects from which their companies, schools, colleagues, and students have benefited. They encourage you to do the same. It means better schools and better business.

PHOTO CREDITS

National Education Association
Joe DiDio

Northwestern Mutual Life Insurance Company

The Daily Pilot Newspaper
Costa Mesa, California
Photographer: Gary Ambrose

Southwestern Life Insurance Company

New England Mutual Life Insurance Company

Bankers Life and Casualty Company